Co-Creating the Civil Society Innovation Initiative: Process Journey from Idea to Design

Executive Summary

The Civil Society Innovation Initiative aims to support, strengthen, and connect civil society actors through a new mechanism: a system of regional civil society support hubs. These regional hubs are being developed through a co-creation process that blends methods from participatory design, strategic planning, and other disciplines. Though the initiative originated with the civil society teams at USAID and Sida, representatives from across civil society are contributing to the co-creation.

The co-creation approach is a unique experiment for USAID, Sida, and many of the others involved. In line with the spirit of inclusive participation and innovation that the initiative intends to foster, the process has progressed through three stages:

- **Define:** USAID and Sida developed a broad vision for the initiative. From an open call, they selected an initial cohort of partner organizations representing the diversity of global civil society. These partners were invited to a co-creation workshop.

- **Explore:** Two of the partners—Reboot and CIVICUS—were asked to facilitate the workshop. Prior to the workshop, they interviewed the other participants, including the convening partners. These conversations mapped the range of issues and challenges facing civil society around the world.

- **Design:** In early November 2014, this diverse group of 64 representatives from 48 civil society organizations gathered in Istanbul for an intensive three days. The workshop itself mirrored the broader process, as participants jointly defined, explored, and designed the regional civil society hubs.

Facilitators guided the design and implementation of the workshop with three core co-creation principles: 1) Build an invested community of collaborators; 2) Break out of established roles and mindsets; and 3) Define the "what" and allow creativity around the "how".

Over the course of the workshop, the group aligned on key aspects of the hubs and the overarching global program. In so doing, the group forged new bonds and began to form a community to carry the initiative forward. This successful co-creation process set a precedent for the next steps of the initiative.

Following the workshop, Reboot and CIVICUS synthesized the programmatic aspects identified during the workshop into a draft concept note for the program. After being refined through feedback from workshop participants, this concept note will guide the next phases of the initiative's development.

About this process journey

This process journey describes the co-creation stage of the Civil Society Innovation Initiative. This stage began with the initiative's conception, and closed with a co-creation workshop and resulting concept note for developing regional hubs to strengthen civil society. The guiding principles and implementation of this initiative to date can provide useful insights for other co-creation processes.

Guiding Vision

The Civil Society Innovation Initiative aims to support, strengthen, and connect civil society actors in both open and closing spaces. Globally, civil society is having increased success in advancing social progress. At the same time, civil society actors are facing mounting backlash that constricts their ability to operate freely and achieve their goals.

To combat growing repression, expand civic space, and strengthen civil society, this initiative will create a number of interlinking regional civil society hubs. These hubs will provide a tailored and evolving set of services to meet the specific needs of a range of civil society actors operating in each region. The hubs will facilitate and convene various actors, match resources to needs, and advise on key issues to civil society.

As the key conveners for this effort, USAID and Sida chose to initiate a co-creation process by which representatives from across civil society would engage in support of the initiative. Co-creation aimed primarily to develop the overarching concept for the global program. It also served to develop an ethos and approach shaping the initiative's next stages.

define:	**explore:**	**design:**
Identify objectives and engage stakeholders around common aims	Discard biases to understand users' perspectives, challenges, and capacities	Develop design criteria based on context and user needs; create, prototype, and iterate.

define:

• Initiative conveners USAID and Sida developed a broad vision statement and initial concept for the initiative

• Through an open call for partners, workshop participants were selected based on their ideas for promoting innovation in civil society and their connection to a sector, organization, or region.

explore:

• Facilitators interviewed nearly all participants and conveners prior to the workshop, surfacing key civil society challenges and innovation approaches that the initiative might address.

• These interviews also revealed distinct expectations and needs that could be addressed in the workshop design, and built individual rapport between participants and facilitators.

design:

• The workshop developed working concepts for the regional hubs and established an invested community of leaders, stewards, and supporters to carry the initiative forward.

• Co-creation facilitators synthesized workshop outputs into a concept note to describe regional hub models and the process for establishing them. Workshop participants continued to offer inputs and suggestions on the concept after the workshop ended.

• Initiative conveners will refine the iterated concept and share it with a broader pool of potential collaborators, kicking off the initiative's next stage: co-design and establishment of regional hubs.

Understanding Co-Creation

USAID and Sida chose a co-creative design process to ensure that the initiative would truly respond to the needs of global civil society actors. Co-creation flips conventional power structures, putting authority and ownership in the hands of end-users. In this case, those users are civil society actors themselves. Co-creation draws on their experiences and knowledge, supplemented by targeted expertise from subject matter specialists, to develop initiatives that are optimized for user needs and goals.

Co-creation can take many forms. In this instance, USAID and Sida had a broadly defined vision and a few concrete parameters for the program, including priority issues and potential mechanisms for addressing challenges. But the concept of this mechanism—the network of regional hubs—was nascent, and specifics for how transition from concept to reality were not yet defined. Rather than creating a program that would be validated through consultation with civil society actors, USAID and Sida aspired to work with these actors as true partners, giving them the rein to define the program's content, structure, and direction as eventual users and stewards of the program.

The crux of the process was a three-day workshop in Istanbul held in early November 2014. However, co-creation started before that. Following an open call for innovation ideas from civil society organizations, USAID and Sida selected a diverse group to participate in a co-creation workshop. Two participating organizations were asked to facilitate the co-creation process: Reboot, a social impact firm based in New York, and CIVICUS, a global alliance of civil society organizations based in Johannesburg. Engaging these groups allowed the convening donors to step back from the facilitation role. Together, the 64 workshop participants co-created the major components of the regional hubs and overall initiative.

Co-Creation for Civil Society Hubs

As the convening donors had defined an overall mandate and were aware of the challenges to co-creation, the facilitators sought to understand the workshop participants and build rapport before bringing them together.

Many participants expressed skepticism that such a large and diverse group could create something meaningful in just a few days. At the same time, the co-creation group was skewed toward larger, Northern organizations, and international NGOs, making it less representative of global civil society than many participants expected. Some participants also questioned the authenticity of the co-creation exercise, suspecting that they would be asked to rubber-stamp a concept that had already been developed. These concerns were surfaced through individual interviews with nearly all of the participants in the weeks prior to the workshop.

In synthesizing these reflections, facilitators heard that participants and conveners both sought to create a program concept that addressed civil society's actual needs through an adaptive program structure that built on existing efforts. For this to happen, the co-creation process would have to respond to the group's common needs and create:

- A sense of **shared goals, values, and priorities** among participants and conveners.
- An understanding of the group's **common challenges and approaches to supporting civil society work**.

Participants also raised these needs as important:

- **Clarity of parameters** for the initiative and resources available.
- An understanding of **participant role(s)** in the continuing initiative.
- An idea of likely **return on their investment** of personal and organizational efforts.
- The opportunity to **make their stamp on the process** and its outcomes.

Co-creation principles

Facilitators used the known challenges of co-creation and the specific participant concerns in defining three principles to guide the design and execution of the workshop.

1. **Build an invested community of collaborators.** Nuture a dedicated community, not simply a consortium of individuals. Sequencing is important: collaborators must build trust and interpersonal connections before tackling the group's technical challenge, then continue to manage and respond to community dynamics and energy levels throughout. Allow the group to hold greater agency over the co-creation process (e.g. by delegating facilitation roles to emergent leaders) as the sense of community develops.

2. **Break out of established roles and mindsets.** Establish different frames for conversation and collaboration that force co-creators out of their familiar roles and mindsets. This may be done by bringing each participant's individual experience to the fore, rather than calling on them as a representative of an organization. Unfamiliar processes, exercises, and room arrangements contribute to this as well. The group must also challenge power dynamics that stem from or reinforce traditional hierarchies, such as donor-grantee or North-South. This may be achieved by: providing specific direction around participation (e.g. traditionally privileged voices, such as donors, are asked to be more sensitive around how their engagement impacts the group); framing conversations in ways that honor and/or rely on the experiences of less-privileged voices; and ensuring more powerful actors are transparent around their politics, interests, and resources.

3. **Define the "what" and allow creativity around the "how".** Articulate a vision and establish the parameters, then guide participants to a shared definition of what success looks like, but leave the specifics of execution open to the co-creators. Ask participants to draw on their own experiences to develop success criteria that are familiar and tangible to the group, rather than based on abstract principles or case studies. Process-wise, use plans as flexible scaffolding rather than fixed itinerary: adapt as necessary. When getting to specifics, unpack language that obscures the real goals: jointly define high-level objectives like "increased impact" and "inclusive participation" more concretely.

Co-Creation Principles in Practice

Workshop activities were designed around the co-creation guiding principles and sequenced to help the group steadily progress in refining the vision for the hubs. This principle-based activity sheet shows the key activities that accomplished this.

Principles	DAY 0	DAY 1: **DEFINE**	DAY 2: **EXPLORE**	DAY 3: **DESIGN**
Build an invested community of collaborators.	Participants arrived knowing little about their fellow participants. An **evening mixer** gave them space to share expectations and understand the range of sectors and experience represented among the group, before formal programming began.	Day 1 started with an "**Opening Circle**" activity where participants introduced themselves and shared how they were feeling at the moment, helping participants see each other first as individuals.	**Evening activities** (including dinners, walking tours, and cultural activities) helped participants unwind after fast-paced days and get to know one another casually.	The final day closed with participants writing and **sharing commitments** to play specific roles in advancing the initiative. The conveners also candidly laid out **next steps** for the initiative, providing insight into their own constraints.
Break out of established roles and mindsets.	Before the full workshop began, **convening donors were reminded** to moderate their influence on the co-creation process. Conveners were asked to use clarifying questions to help guide the co-creative process, rather than advance specific viewpoints that might direct conversations.	**A prototyping and pitch exercise** was a fun way to introduce the basics of the design process, spur creative thinking, and help participants establish norms for working together in teams.	Day 2 started with a laugh in an "**Unpacking Buzzwords**" activity: participants were reminded to exchange ideas instead of typical civil society jargon. Participants organized their own discussions in "**Open Spaces**" sessions on topics tangential to the broader workshop. This promoted greater sharing and collective problem-solving. Participants who had been quieter in plenary led many of these sessions.	The bulk of Day 3 was spent in working groups creating **regional hub blueprints**. Participants joined the working group for the region they felt most connected to, bringing a range of organizational, professional, and personal experiences that were incorporated in each hub design. Groups were able to flexibly define and prioritize the hub "nuts and bolts", and organize their working time according to their members' preferences.
Define the what and allow creativity around the how.		Participants were initially unclear on the purpose of the workshop. An early presentation and Q&A **session with the convening donors** set a few parameters, and told the participants to design the rest. In a **framing presentation**, facilitators more clearly defined the initiative's scope by outlining challenges facing civil society globally. Participants honed this further by breaking into groups based on job function to discuss issues hindering their individual work day-to-day.	The group jointly aligned on a set of key "**nuts and bolts**" (e.g. service offerings, business model) that designs of the hubs should include in some form. This gave participants useful categories within which to design, while also providing leeway to create regionally-specific content. Participants mapped civil society initiatives they had personally found successful, identifying the specific elements that had made these initiatives useful. Commonalities were synthesized to **define success factors** that participants could include in their hub designs.	Regional groups **presented their blueprints** and discussed them in plenary. **Synthesizing commonalities in the models**, collaborators saw that their visions for the hubs converged in many important areas. There was also broad agreement on key issues yet to be resolved. Drawing the exercise to a close, **feedback from conveners (and participants)** affirmed that the group had surpassed its own expectations by aligning on core elements of the global program and regional hubs.

Energy Flow, Concept Convergence, and Key Junctures

DAY 0	DAY 1: **DEFINE**	DAY 2: **EXPLORE**	DAY 3: **DESIGN**

Over the three-day intensive workshop, the diverse group brought its collective knowledge and focus to the task in less time than it usually takes to overcome jet lag. It was not a linear path: energy levels and conceptual clarity varied as the group coalesced into a community, broke out of typical mindsets, and filled the design space with creative ideas. The workshop design intentionally sequenced activities and crafted framing aimed at both strengthening community dynamics and creating the outlines of the regional hub concept.

Community Vitality

The cohesion, engagement, and energy of the workshop group evolved over the course of the three days. Specific activities influenced these dynamics and supported—or hindered—the group in collaboratively advancing the concept development.

Concept Convergence

Participants entered the workshop with varied understandings of the initiative goals, ideas for hubs, and expectations for their roles as workshop participants. By the close of the workshop, questions remained, but the group had largely converged in agreement on major elements of the hubs' design.

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1 Participants—representing diverse backgrounds and even some competing organizations—had little interaction before the workshop. An **evening mixer** allowed them to start getting to know each other and establish foundations for relationships before starting work.

2 An **opening presentation and Q&A with converners** reinforced the donors' authority in setting key initiative parameters, but also allowed participants to engage with them freely, partially levelling the field. Participants began to understand the parameters of the task at hand.

3 A high-energy **prototyping and pitch exercise** was a fun, engaging way for participants to build individual connections get comfortable creating with each other.

4 The fun energy of the previous day turned serious, as **participants interrogated specific design criteria** for the hubs.

Feeling more comfortable with each other, the group started exploring design ideas that would later feed into their blueprints for regional hubs.

5 Before the group began designing hub blueprints, "**Open Spaces**" provided participants the opportunity to self-organize sessions on tangential topics. This opportunity was taken by a number of participants who had been less vocal in plenary sessions, allowing them to share their expertise and connect with fellow participants in a relaxed forum.

6 The final day started early, with teams self-organizing breakfast meetings to **create blueprints for regional hubs**. They worked through the morning, with little intervention by the facilitation team.

Final blueprint presentations demonstrated a common vision among participants, but expressed in a diversity of design strategies.

7 Converners' **feedback on the blueprints**, and their candor in **presenting next steps** underscored their intent to continue working co-creatively. **Participants made specific commitments** to continuing the process as the hubs become a reality.

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Outcomes from the Process

Through the enthusiastic efforts of the collaborators, the co-creation process achieved its stated goal: collaboratively define key aspects of the hubs and the overarching initiative. In building community among collaborators and trust in the co-creation process, it also laid a strong foundation for the initiative's next steps.

Co-created concept for the regional civil society hubs: The workshop surfaced and aligned participants on many of the key ingredients and parameters for the regional hubs. Following the workshop, facilitators synthesized elements of the regional hub blueprints created on the final day into a concept note for the overall initiative.

"[A significant achievement of the group was] putting out some really interesting ideas in the process of the design of the hub, which I believe put into currency the use of new language/words/terms, new concepts, and new thinking around civil society programming."

Invested community to take the effort forward: Workshop collaborators, including the invited participants and the donors, gamely took off their organizational hats and collaborated openly; consequently, traditional power dynamics were softened. The workshop experience closed with collaborators feeling personally invested in the initiative and connected to their fellow co-creators through newfound bonds of trust and established common ground.

"From my personal experience I think we have begun to build community. It is rare that I have reason to follow up with so many people...This provides a good foundation for the future."

Model for co-creation for future stages of the initiative: This co-creation experience has shown that the approach can succeed, and has created a precedent on which to build. Key lessons from this experience were to ensure greater representation of organizations and individuals from the Global South, small CSOs, and non-traditional civil society actors; to build in more time for discussion and refinement of final models; and to bring participants' preparatory ideas (in this case, innovation concepts) more fully into the co-creation process. In feedback, participants also raised questions about the boundaries of co-creation—how to strike the right balance between having a clear vision for success, without predefining a solution. These takeaways provide points of learning and growth for future co-creation experiences.

"Very different approaches at the outset led to similar [hub blueprints], showing that there is a lot that unites us, despite detailed understanding and contextualizing needed. It showed that we can devise common strategies together that can be refined once objectives, expectations and focus become clearer."

Moving Forward

This co-creation workshop could not answer every question about the purpose and design of the regional hubs or the broader initiative. The concept note, which accompanies this process journey, includes a framework blueprint for the hubs and outlines a process of regional workshops to co-design for establishing region-specific hubs. Further details will be defined by those who will directly use and support the regional hubs.

Co-creation was the first step. For the regional hubs, or any initiative using co-creation, there will necessarily be further work to transition the designs to implemented reality.